

CASE STUDY

CLIENT: First Assistance

INDUSTRY: Business Services

LOCATION: New Zealand

PRODUCT SUITE: EXO Business

MYOB ENTERPRISE PARTNER: GlobalBizpro

B2B service provider finds the way to stay on top of a demanding client base is to integrate internal processes.

Overview

Established in New Zealand in 1992, First Assistance is now a leading supplier of first line assistance services.

The company supplies its clients with the personnel, technology and solutions they need to keep in touch with their customers 24/7, 365 days a year.

But with clients ranging from insurers to assistance companies, financial services agencies and government agencies, First Assistance has to work hard to stay on top of every job. The only way to do that successfully is to ensure that internal processes are as seamless as possible.

Looking for robust integration

Until recently, First Assistance had been using the South African accounting and payroll package Pastel Partner.

The system had good functionality and reliable reporting, according to Stephen Horne, Financial Controller at First Assistance – but it struggled to integrate with other programs.

“This was a hindrance,” says Horne, “because we were expanding our in house software and needed data to flow freely around the organisation”.

Horne and his team decided to look at a version of Pastel Partner that is designed specifically to bring all aspects of an operating environment together.

But the cross integration still didn't seem that robust, according to Horne.

Three months later, First Assistance evaluated MYOB's EXO Business.

“EXO appeared to have that ability to integrate with other products. It had sound bookkeeping and accounting capabilities too,” says Horne, “which was exactly what we were looking for”.

So on the recommendation of MYOB, First Assistance contacted EXO-specialist GlobalBizpro.

Scoping the project

While EXO might have looked right on paper, it was Michael Abawat at GlobalBizpro who demonstrated just how the system would work in practice.

“I think it was our development capabilities, coupled with EXO's flexibility that won First Assistance over at the end of the day,” says Abawat.

GlobalBizpro also had experience with Pastel Partner, which helped when it came to transferring data between the two systems.

“They were a really good crowd to work with,” says Horne of GlobalBizpro – “professional and diligent”.

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“Together, we scoped out the structure of our general ledger accounts, stock, debtors and creditors – as well as a number of in-built reports [including debtors invoices, statements, age analyses, and remittance advice for creditors]. Then we prepared a transfer spreadsheet, to ensure the right data was imported into the new system.”

The benefit of a trial

In the first instance, GlobalBizpro created a trial version of EXO, to give First Assistance time to adapt from Pastel Partner. And this, according to Horne, was invaluable.

“We were able to get up to speed with the new system in our own time, before it went live. We were even able to create our own in-house training notes and screen shots, thanks to the detailed overview that GlobalBizpro gave us.”

When the live system finally launched, everything went exactly as planned – without a hitch.

“Thanks to their training, staff were already familiar with EXO,” says Horne.

“Naturally there was the odd small data entry teething problem,” he adds, “but that was easily sorted out – either in-house or with the help of GlobalBizpro”.

The early wins

EXO has only been in use at First Assistance a few months, but Horne says it’s already made a real difference being able to extract a trial balance income.

“This is something we could never do with Pastel Partner.”

“We’ve now got a choice. We can either get a snapshot view in EXO, or export EXO’s data to Alchemex and from there into a customised spreadsheet.”

“That flexibility just wasn’t there before,” adds Horne.

He says it’s now easier to create detailed reports too, thanks to EXO’s multiple general ledger codes and subcodes.

Collaborative working

A number of areas in EXO required extensive customisation to support First Assistance’s reconciliation and cost recovery.

In one such change, GlobalBizpro compiled a number of triggers to ensure that case numbers could be threaded through all sales transactions and on into general ledger. They also developed an interface tool to import creditor invoices from another in-house system.

First Assistance now plans to integrate EXO with an external case management system that they are developing.

“A big portion of our outbound cash goes to myriad roadside service medical providers – both here and outside New Zealand. Because we have so many jobs, we produce literally thousands of debtors’ invoices. And staying on top of those is a huge task,” says Horne.

In future, estimates for these providers will be generated in the external system, while EXO will handle payments in real time, receiving the data needed to invoice debtors on a daily, weekly or monthly basis.

“Essentially, we’ll be using EXO as a real time data conduit between our various modules,” says Horne.

“That, of course, is the beauty with EXO,” he adds.

“Its ability to integrate means we can continue to expand our in-house system without worrying that we’ll be stuck with legacy software five years down the track.”

Client and Enterprise partner details

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www.firstassistance.co.nz



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